

Message Text

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C O N F I D E N T I A L SECTION 01 OF 03 LONDON 12777

USEEC ALSO FOR EMBASSY
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PASS TREASURY, LABOR AND FRB

E.O. 11652: GDS
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SUBJECT: POLITICAL OUTLOOK AS PARLIAMENT RISES

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SUMMARY - AS PARLIAMENT RECESSES FOR THE SUMMER, THE
POLITICAL OUTLOOK FOR THE LABOR GOVERNMENT, ALTHOUGH
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FREE FROM ANY APPARENT NEAR-TERM THREAT, IS ONE OF CON-
SIDERABLE UNCERTAINTY. THE TUC'S INABILITY TO IMPOSE A
THIRD YEAR OF FORMAL PAY RESTRAINT ON UNION MEMBERS IS
THE ROOT CAUSE OF THE UNCERTAINTY CALLAGHAN WILL FACE IN
THE COMING MONTHS. HOWEVER, OTHER POLITICAL DEVELOP-
MENTS -- RENEWAL OF THE LIBERAL PACT, THE APPARENTLY
SUCCESSFUL EFFORT TO PREVENT OTHER MINOR PARTIES FROM

SUPPORTING CONSERVATIVE EFFORTS TO OUST THE GOVERNMENT AND THE TUC'S REAFFIRMATION OF THE SOCIAL CONTRACT -- HAVE BEEN FAVORABLE FOR CALLAGHAN AND AMELIORATED THE POLITICAL DANGER POSED BY THE ABSENCE OF A PHASE III AGREEMENT ON WAGES. THE GOVERNMENT AND MOST OF ITS SUPPORTERS BELIEVE THE POLITICAL PROBLEMS AHEAD ARE MANAGEABLE, AND THAT A GENERAL ELECTION IS UNLIKELY BEFORE THE FALL OF 1978. THIS VIEW MAY BE OVERLY SANGUINE. EVEN THOUGH THERE IS NO VISIBLE THREAT TO THE GOVERNMENT IN PARLIAMENT, THE PATTERN OF WAGE SETTLEMENTS OVER THE NEXT THREE MONTHS, OR THE OCCURRENCE OF SERIOUS CONFRONTATION BETWEEN THE GOVERNMENT AND UNIONS, COULD ALTER THIS PICTURE RADICALLY. INDEED, IT IS POSSIBLE TO ENVISAGE A SCENARIO WHICH WOULD CAUSE CALLAGHAN TO CALL ELECTIONS IN THE SPRING OR TO FACE THE PROSPECT OF BEING FORCED TO ELECTIONS UNDER CIRCUMSTANCES EVEN MORE FAVORABLE FOR THE TORIES. INDUSTRIAL RELATIONS DEVELOPMENTS WILL PROBABLY BE THE DETERMINATIVE INFLUENCE AT WORK BETWEEN NOW AND NEXT SPRING. END SUMMARY.

1. PARLIAMENT WENT INTO SUMMER RECESS JULY 29 UNTIL LATE OCTOBER, WHEN IT WILL RETURN FOR TWO OR THREE DAYS TO TIE UP LOOSE ENDS AND TO BE FORMALLY PROROGUED SO THE NEXT SESSION CAN BE CONVENED IN EARLY NOVEMBER. AS A RESULT, CALLAGHAN CAN COUNT ON A THREE-MONTH PARLIAMENTARY HIATUS FOR HOLIDAYS AND THE PARTY CONFERENCE SEA-

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SON. AT PARTY CONFERENCE IT CAN BE SAFELY PREDICTED THE LABOR PARTY WILL EXPOSE AND HIGHLIGHT ITS TRADITIONAL FACTIONALISM, THE CONSERVATIVES WILL SEEK TO PROJECT AN IMAGE OF RESPONSIBILITY AND COMPETENCE, AND THE LIBERALS WILL TRY TO EXPLOIT THEIR NEWLY-FOUND POLITICAL RELEVANCE. THESE CERTAINTIES, HOWEVER, WILL BE AT THE MARGIN OF BRITAIN'S POLITICAL CRUCIBLE WHERE THE GOVERNMENT'S FUTURE IS LIKELY TO BE FORGED. AND UNCERTAINTY PREVAILS AT THE CENTER.

2. THE EVENT MOST DIRECTLY RESPONSIBLE FOR THIS POLITICAL UNCERTAINTY WAS THE TUC'S INABILITY TO IMPOSE A THIRD ROUND OF PAY RESTRAINT ON AN INCREASINGLY RESTIVE UNION RANK AND FILE, WHICH THREATENS THE GOVERNMENT'S POLITICAL AND ECONOMIC STRATEGIES AND HAS THE POTENTIAL TO IMPACT ADVERSELY ON ALL SIX OF THE CRITICAL VARIABLES (REF A) WE BELIEVE WILL DETERMINE WHEN AND UNDER WHAT CIRCUMSTANCES CALLAGHAN WILL NEXT FACE A GENERAL ELECTION. OTHER EVENTS, SOME FLOWING FROM THE TUC'S INABILITY TO DELIVER ON PHASE III, ALSO IMPACT ON THE POLITICAL EQUATION, BUT THEY HAVE BEEN BROADLY FAVORABLE FOR CALLAGHAN AND HIS GOVERNMENT.

3. THERE HAVE BEEN THREE MAJOR POLITICAL DEVELOPMENTS
IN RECENT WEEKS WHICH DESERVE MENTION. THE GOVERNMENT'S
APPARENT SUCCESS IN DEVISING INCENTIVES FOR THE ULSTER
UNIONISTS (THE SPEAKER'S CONFERENCE ON NI PARLIAMENTARY

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C O N F I D E N T I A L SECTION 02 OF 03 LONDON 12777

C O R R E C T E D C O P Y (TEXT--PARA THREE)

REPRESENTATION) AND THE SCOTTISH AND WELSH NATIONALISTS
(REINTRODUCTION OF THE DEVOLUTION BILLS) TO SUPPORT THE
GOVERNMENT, OR AT LEAST WITHHOLD THEIR SUPPORT FROM
CONSERVATIVE EFFORTS TO UNSEAT IT, SHARPLY DIMINISHES
THE LIKELIHOOD THAT THE GOVERNMENT WILL FALL ON A CON-
FIDENCE ISSUE DURING THE NEXT 6 TO 8 MONTHS. THESE
DEVELOPMENTS, MOREOVER, HAVE DIMINISHED THE SIGNIFICANCE
OF THE LIBERAL PACT AND HENCE THE LIBERALS' LEVERAGE --
WITH THE MINOR PARTIES ABSTAINING, THE LIBERALS AND THE

CONSERVATIVES DO NOT HAVE ENOUGH VOTES TO DEFEAT CALLAGHAN. THE GOVERNMENT'S EASY PASSAGE ON THE JULY 20 CONFIDENTIAL

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FIDENCE VOTE ON ITS ECONOMIC AND INDUSTRIAL RELATIONS POLICIES ILLUSTRATED THE RELATIVE SECURITY OF ITS PARLIAMENTARY POSITION. THE SECOND IMPORTANT DEVELOPMENT WAS THE JULY 27 GOVERNMENT/TUC REAFFIRMATION OF THE SOCIAL CONTRACT IN WHICH THE TUC, INTER ALIA, PLEDGED ITS CONTINUED SUPPORT TO THE GOVERNMENT. THE FOLLOWING DAY THE LIBERALS RENEWED THEIR PACT WITH THE GOVERNMENT, COMPLETING THE TRIAD, THOUGH THIS TIME THEIR SUPPORT IS AT LEAST IN THEORY CONDITIONED ON THE GOVERNMENT'S RESOLVE IN MAKING ITS 10 PERCENT WAGE SETTLEMENT GUIDELINE AND THE 12-MONTH PERIOD BETWEEN PAY SETTLEMENTS STICK.

4. TURNING TO THE IMPACT THESE EVENTS HAVE HAD ON THE SIX KEY, INTER-DEPENDENT VARIABLES IDENTIFIED IN REF A, IT IS EVIDENT THAT THE PARLIAMENTARY LABOR PARTY'S (PLP) COHESION IS SOUND -- WITNESS THE JULY 20 CONFIDENCE VOTE. THE TUC'S SUBSEQUENT RECONFIRMATION OF ITS SUPPORT FOR THE GOVERNMENT REINFORCED THIS UNITY. YET IT IS UNDENIABLE THAT THE ABSENCE OF A PHASE III WAGES ACCORD IS POTENTIALLY DAMAGING TO THE PLP'S COHESIVENESS. FAILURE TO ENFORCE THE 10 PERCENT GUIDELINE, FOR EXAMPLE, COULD TRIGGER DEFECTIONS FROM THE PLP RIGHT-WING AS WELL AS FROM THE LIBERAL PARTY, WHILE CONFRONTATION WITH THE UNIONS AND DETERIORATING RELATIONS WITH THE TUC WOULD PLACE LEFT-WING PLP SUPPORT IN JEOPARDY. THE NEUTRALIZATION OF THE OTHER MINOR PARTIES AND THE THREAT TO PLP COHESION BOTH REDUCE, BUT DO NOT ELIMINATE, THE IMPORTANCE OF THE LIBERAL PACT. IF THE LIBERALS SHOULD MOVE SQUARELY INTO OPPOSITION -- UNLIKELY, SINCE THEY STILL HAVE NO DESIRE FOR EARLY ELECTIONS, BUT POSSIBLE IF THE WAGE GUIDELINES COLLAPSE -- THE SCOTTISH NATIONALISTS MIGHT DECIDE THAT THEY HAD MORE TO GAIN FROM AN ELECTION THAN FROM ENACTMENT OF THE DEVOLUTION BILL, BUT THIS TOO CONFIDENTIAL

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SEEMS UNLIKELY. IN SUCH A CASE THE GOVERNMENT WOULD FALL.

5. IN THE ABSENCE OF A PHASE III AGREEMENT, ENFORCEMENT OF THE WAGES GUIDELINE AND THE 12-MONTH RULE FALLS LARGELY ON THE GOVERNMENT, THOUGH MANAGEMENT AND THE TUC WILL PLAY AN IMPORTANT ROLE. WILL THE GOVERNMENT HAVE

THE POLITICAL WILL AND SKILL TO USE THE TOOLS AT ITS DISPOSAL TO COUNTER EXCESSIVE PAY SETTLEMENTS AT THE RISK OF CONFRONTATION WITH SOME UNIONS? THIS QUESTION SUGGESTS THAT THE "POLITICAL ROT" VARIABLE WILL BECOME INCREASINGLY IMPORTANT IN THE COMING MONTHS. INCREASED STRESS BETWEEN, ON THE ONE HAND, THE GOVERNMENT AND, ON THE OTHER, THE TUC, THE PLP AND THE LIBERALS, SHOULD IT EVENTUATE, MAY ALSO MEAN THAT THE GOVERNMENT'S PROPENSITY FOR POLITICAL MISCALCULATION WILL BECOME GREATER. AS PRESSURES BECOME MORE INTENSE, CALLAGHAN AND HIS COLLEAGUES WILL PROBABLY TAKE POLITICAL RISKS THAT THEY WOULD OTHERWISE ESCHEW, AND THE GREATER THE RISK, THE GREATER THE CHANCE FOR SERIOUS MISJUDGMENT. TOM MCNALLY, CALLAGHAN'S POLITICAL ADVISER, TOLD US THE PM IS CONFIDENT HE CAN MANAGE THE SITUATION, PICKING AND CHOOSING THOSE WAGE DEMANDS THAT WILL BE GRANTED AND THOSE WHICH WILL BE RESISTED. THOUGH HE IS BETTER EQUIPPED THAN HEATH WAS FOR THIS TYPE OF OPERATION, IT IS UNDOUBTEDLY GOING TO PROVE DIFFICULT TO IMPLEMENT.

6. IT IS EVIDENT THAT GOVERNMENT/TUC RELATIONS REMAIN VERY GOOD, DESPITE THE ABSENCE OF A PHASE III ACCORD. BUT BOTH SIDES ARE DEEPLY CONCERNED ABOUT THE FUTURE, FOR JUST AS EVIDENTLY THE LACK OF A FIRM WAGES POLICY INCREASES THE LIKELIHOOD OF DISAGREEMENT, ESTRANGEMENT AND CONFLICT. IF WAGE SETTLEMENTS SHOULD BEGIN TO ESCALATE SHARPLY, OR THE 12-MONTH RULE BE VIOLATED WITH IMPUNITY, THE SPIRAL TOWARD CONFLICT WOULD BEGIN. SINCE THIS VARIABLE DEPENDS SO DIRECTLY ON THE SHAPE AND MAGNITUDE
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OF WAGE SETTLEMENTS AND IMPACTS SO HEAVILY ON THE OTHER VARIABLES, WE EXPECT IT WILL BE THE PIVOTAL POLITICAL FACTOR OVER THE NEXT 12 MONTHS. THE ECONOMIC SITUATION, TOO, IS HEAVILY DEPENDENT UPON WHAT HAPPENS ON THE IN-

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C O N F I D E N T I A L SECTION 03 OF 03 LONDON 12777

DUSTRIAL RELATIONS FRONT. AND SUCCESS OF CALLAGHAN'S
LONGER-TERM POLITICAL STRATEGY RESTS SQUARELY ON
SUCCESS IN THE ECONOMIC FIELD. PUT MORE PRECISELY,
WITHOUT FALLING INFLATION, ECONOMIC GROWTH AND DECLINING
UNEMPLOYMENT, THE ODDS ON REELECTION OF A LABOR GOVERN-
MENT ARE LONG. PERCEPTIONS OF BRITAIN'S ECONOMIC STATE
ALSO IMPINGE DIRECTLY ON PARLIAMENTARY AND TRADE UNION
ATTITUDES.

7. ALTHOUGH OUR ANALYSIS INDICATES THAT THE MEDIUM- AND
LONG-TERM POLITICAL OUTLOOK FOR THE CALLAGHAN GOVERNMENT
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HAS DARKENED, GOVERNMENT MINISTERS AND MOST LABOR BACK-
BENCHERS APPEAR CONFIDENT THAT THE PROBLEMS CALLAGHAN
FACES ARE MANAGEABLE AND THAT HE WILL MANAGE THEM SUC-
CESSFULLY. THE GREAT MAJORITY EXPRESS CONFIDENCE THE
GOVERNMENT WILL BE ABLE TO AVOID A GENERAL ELECTION UN-
TIL THE FALL OF 1978 (SOME BELIEVE IT IS STILL POSSIBLE
FOR THE GOVERNMENT TO RUN INTO 1979). OTHER LABOR
BACKBENCHERS, HOWEVER, ARE LESS SANGUINE, AS ARE MANY OF
THE TRADE UNION LEADERS WITH WHOM WE HAVE SPOKEN. THIS
"PESSIMISTIC SCHOOL" BELIEVES THE SPRING OF 1978 IS A
MORE LIKELY ELECTION TIMEFRAME. BOTH ASSESSMENTS' OF
COURSE, ARE SPECULATIVE, BUT WE SHARE WITH THE PESSIMISTS

THE VIEW THAT THE GOVERNMENT MAY BE OVERLY SANGUINE ABOUT ITS PROSPECTS.

8. A MORE DEFINITIVE ASSESSMENT SIMPLY CANNOT BE MADE UNTIL THE TRENDS SET BY THE EARLY WAGE SETTLEMENTS BEGIN TO EMERGE. EVEN THEN, ASSESSMENT MAY NOT BE EASY BECAUSE OF THE ACCENT ON FLEXIBILITY AND EXCEPTIONS TO THE GENERAL RULES. WE DOUBT, HOWEVER, THAT WAGE SETTLEMENTS OVER THE NEXT YEAR CAN BE HELD TO AN AVERAGE OF 10 PERCENT (EXCLUDING PRODUCTIVITY-FINANCED INCREASES). BUT WE CANNOT PREDICT WHETHER THE AVERAGE WILL BE 2, 5, 8 OR MORE POINTS ABOVE THE STATED GOAL. THERE WILL ALSO BE PRESSURES TO BREACH THE 12-MONTH RULE. AND EVEN IT WILL NOT BE AS EASY TO JUDGE AS IT APPEARS, SINCE SELF-FINANCING PRODUCTIVITY DEALS AND RETIREMENT BENEFITS ARE EXEMPTED. IT IS NOT YET CLEAR HOW THE GOVERNMENT AND TUC WILL HANDLE ROGUE UNIONS WHICH ATTEMPT TO DISREGARD BOTH RULES, BUT IT CANNOT BE ASSUMED THAT A HANDFUL OF "EXCEPTIONS" WILL TRIGGER AN AVALANCHE OF VIOLATIONS.

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9. IF THE GOVERNMENT'S RESOLVE ON THE WAGES FRONT BEGINS TO COLLAPSE AND ITS POLICIES UNRAVEL, IT IS POSSIBLE TO FORESEE A SITUATION DEVELOPING THAT WOULD LEAD TO A GENERAL ELECTION NEXT SPRING. A RAPID CHANGE IN THE PARLIAMENTARY SITUATION -- E.G. LIBERAL RENUNCIATION OF THE PACT, COUPLED WITH A STALEMATE ON DEVOLUTION WHICH WOULD QUICKLY TURN THE NATIONALISTS TO OUTRIGHT OPPOSITION, OR DEFECTIONS FROM THE LEFT OR RIGHT OF THE PLP -- COULD FORCE AN ELECTION. ALTERNATIVELY, CALLAGHAN MIGHT BE FACED WITH A SLOWLY DETERIORATING POSITION ON BOTH THE PARLIAMENTARY AND INDUSTRIAL FRONTS AND DECIDE TO PRE-EMPT THE OPPOSITION BY CALLING AN ELECTION. THERE WOULD BE STRONG ARGUMENTS FOR SUCH PRE-EMPTIVE MOVE -- HE WOULD RETAIN THE INITIATIVE, THE INFLATION RATE MAY DIP SIGNIFICANTLY IN THE SPRING (SEE EMBASSY ASSESSMENT IN REF B), LABOR'S STANDING AMONG ITS TRADITIONAL VOTERS SHOULD IMPROVE AS PAY ANOMALIES ARE REDUCED AND WORKERS BRING HOME OR HAVE THE PROSPECT OF LARGER PAY PACKETS, AND THE GOVERNMENT MAY BE IN A POSITION TO TAKE SOME REFLATIONARY MEASURES. HOWEVER, THEY DO NOT APPEAR FULLY PERSUASIVE. FOR EXAMPLE, WE ARE SKEPTICAL THAT THE LIBERALS WILL RENOUNCE THEIR PACT WITH THE GOVERNMENT SHORT OF A WAGES EXPLOSION; WE BELIEVE THE SCOTTISH DEVOLUTION BILL HAS A GOOD CHANCE OF PASSAGE AND ITS ABANDONMENT BY DISSOLVING PARLIAMENT WOULD DAMAGE LABOR SEVERELY IN ITS SCOTTISH STRONGHOLD; AND WE SUSPECT LABOR WILL STILL BE RUNNING WELL BEHIND

THE TORIES IN THE OPINION POLLS COME SPRING.

10. BOTH THE FORCED ELECTION AND THE PRE-EMPTIVE
SCENARIOS ARE SPECULATIVE, BUT NEITHER CAN BE DISCOUNTED.
AS THEY ARE BOTH HEAVILY CONTINGENT ON INDUSTRIAL RELA-
TIONS DEVELOPMENTS, WE CAN ONLY REEMPHASIZE THE IM-
PORTANCE OF THE TRENDS THAT WILL EMERGE AS THE COST AND
TERMS OF THE NEXT ROUND OF PAY SETTLEMENTS BECOME
KNOWN.

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